

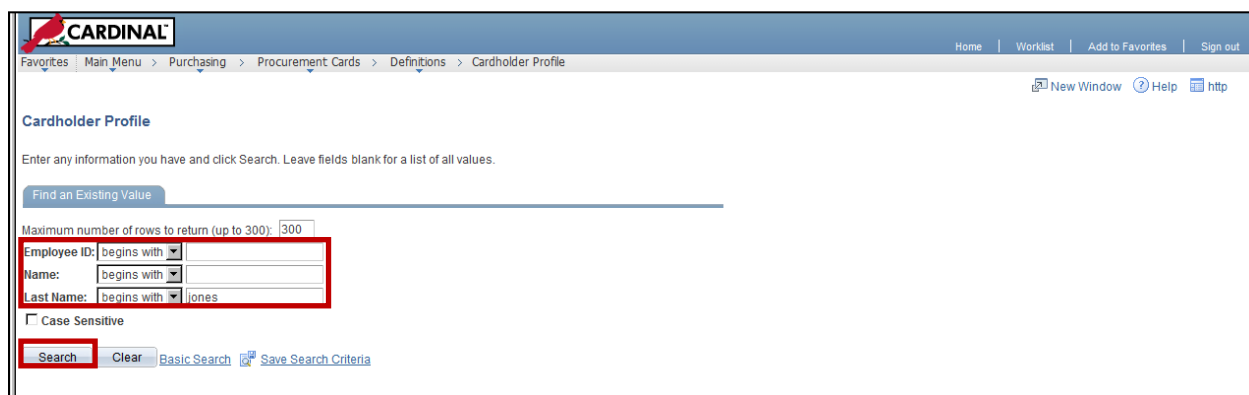
About PCard / Integrated Services Supply Program (ISSP) Set-Up:

PCard/ISSP transactions are specific to each Cardholder (PCard) and District (ISSP Location) and are approved by their Managers and Back-Ups. Each Cardholder and ISSP location is setup as individual PCards and the transactions are managed using the Procurement Card pages in Cardinal.

PCARD Set-Up**Pages 1- 5****ISSP Set-Up****Pages 5 - 9****PCARD Set-UP**

To add a PCard holder, the employee's name must be present in Cardinal.

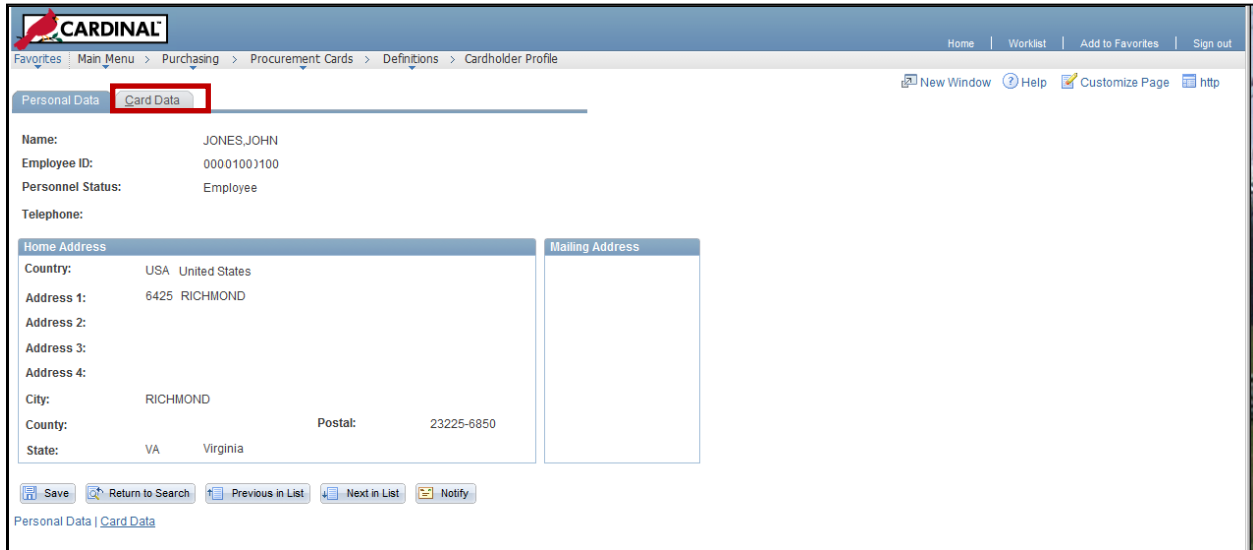
- 1 The Agency PCard Administrator(s) enters the Cardholder data into the PCard Issuer system.
(i. e. *Bank Of America "WORKS"*)
- 2 Navigate to **Purchasing > Procurement Cards > Definitions > Cardholder Profile**



The screenshot shows the 'Cardholder Profile' page in the Cardinal PCard Issuer system. The breadcrumb trail at the top reads: 'Favorites | Main Menu > Purchasing > Procurement Cards > Definitions > Cardholder Profile'. Below the breadcrumb, there is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A search bar with the placeholder 'Find an Existing Value' is present. Below the search bar, there is a section for search criteria. It includes a dropdown for 'Maximum number of rows to return (up to 300):' set to '300'. Below this are three search fields: 'Employee ID: begins with', 'Name: begins with', and 'Last Name: begins with'. The 'Last Name' field has 'Jones' entered. Below these fields is a checkbox for 'Case Sensitive'. At the bottom of the search section, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

- 3 Narrow your search for a particular District using the **Employee ID** field or any other search criteria.
- 4 Click the **Search** button.

PCard/ISSP Set-Up



CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing > Procurement Cards > Definitions > Cardholder Profile

Personal Data | **Card Data**

New Window | Help | Customize Page | http

Name: JONES,JOHN
Employee ID: 00001001100
Personnel Status: Employee
Telephone:

Home Address

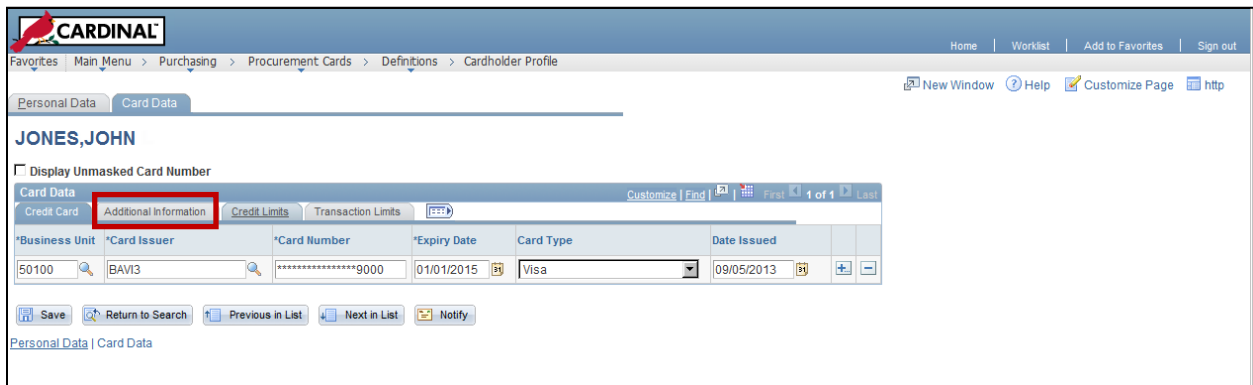
Country: USA United States
Address 1: 6425 RICHMOND
Address 2:
Address 3:
Address 4:
City: RICHMOND
County: Postal: 23225-6850
State: VA Virginia

Mailing Address

Save | Return to Search | Previous in List | Next in List | Notify

Personal Data | Card Data

5 Click on the **Card Data** tab.



CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing > Procurement Cards > Definitions > Cardholder Profile

Personal Data | **Card Data**

New Window | Help | Customize Page | http

JONES,JOHN

☐ Display Unmasked Card Number

Card Data | Credit Card | **Additional Information** | Credit Limits | Transaction Limits | Customize | Find | First | 1 of 1 | Last

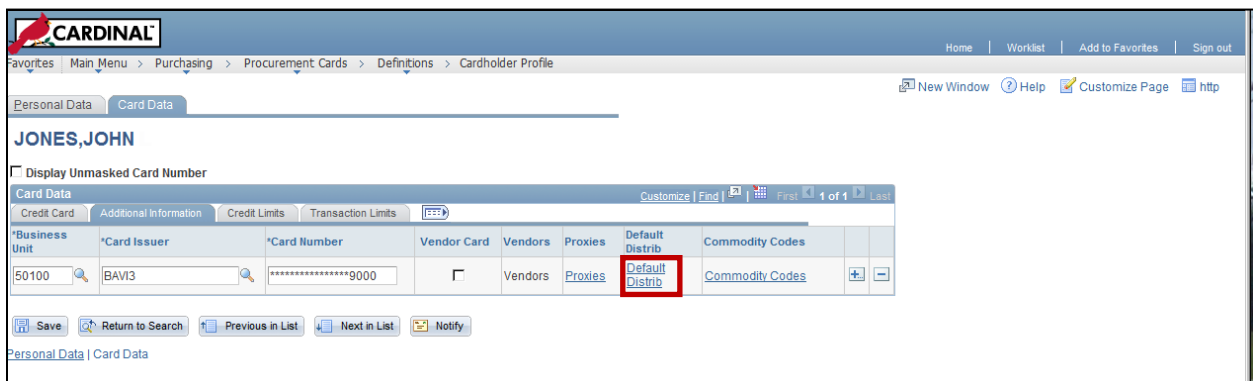
*Business Unit	*Card Issuer	*Card Number	*Expiry Date	Card Type	Date Issued
50100	BAV13	*****9000	01/01/2015	Visa	09/05/2013

Save | Return to Search | Previous in List | Next in List | Notify

Personal Data | Card Data

6 Enter PCard information (example shown).

7 Click **Additional Information** tab.



CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing > Procurement Cards > Definitions > Cardholder Profile

Personal Data | **Card Data**

New Window | Help | Customize Page | http

JONES,JOHN

☐ Display Unmasked Card Number

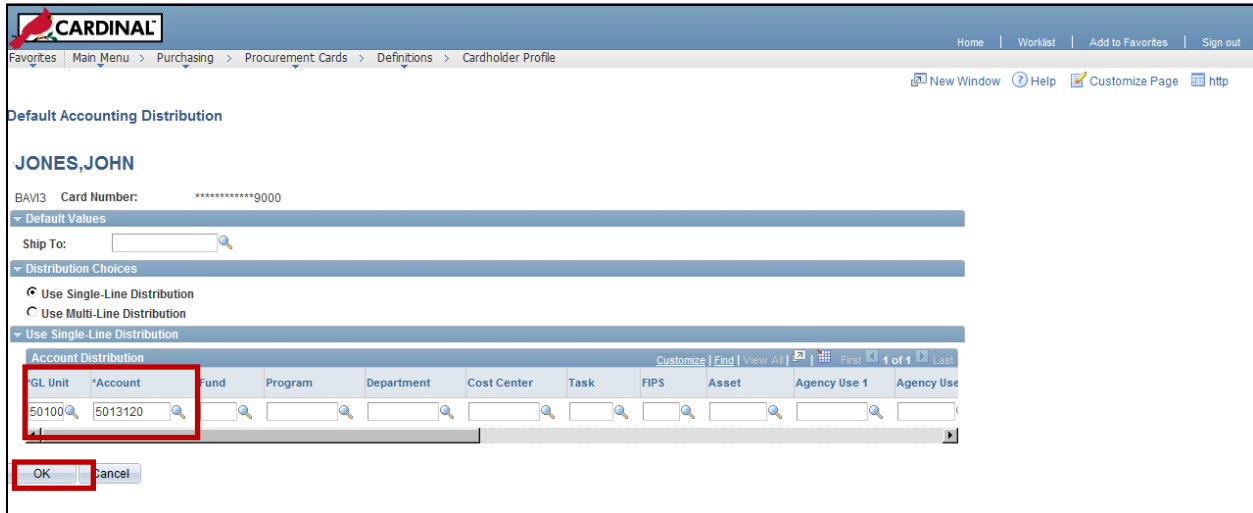
Card Data | Credit Card | Additional Information | Credit Limits | Transaction Limits | Customize | Find | First | 1 of 1 | Last

*Business Unit	*Card Issuer	*Card Number	Vendor Card	Vendors	Proxies	Default Distrib	Commodity Codes
50100	BAV13	*****9000	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes

Save | Return to Search | Previous in List | Next in List | Notify

Personal Data | Card Data

8 Click **Default Distrib** hyperlink.



CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Procurement Cards > Definitions > Cardholder Profile

New Window | Help | Customize Page | http

Default Accounting Distribution

JONES, JOHN

BAV13 Card Number: *****9000

Default Values

Ship To:

Distribution Choices

☒ Use Single-Line Distribution
☐ Use Multi-Line Distribution

Use Single-Line Distribution

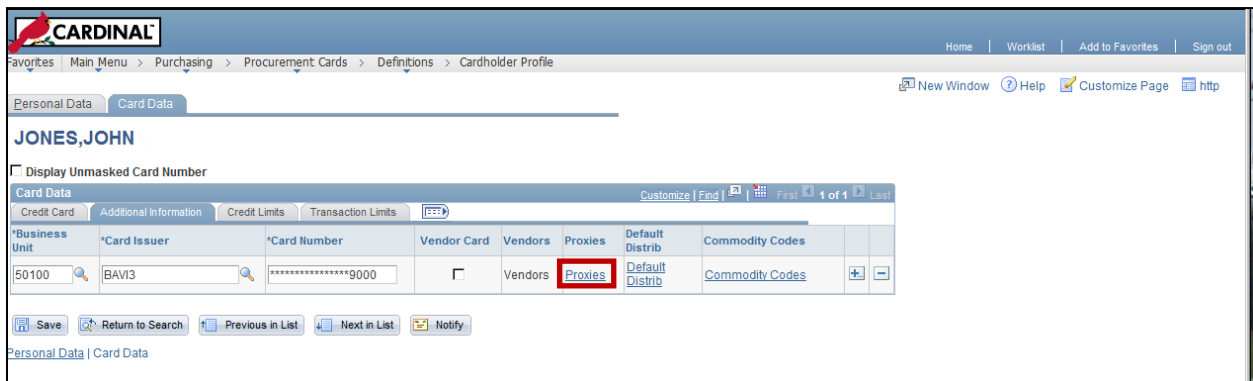
Account Distribution

GL Unit	*Account	Fund	Program	Department	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2
50100	5013120									

OK Cancel

9 Enter **GL Unit** and **Account** (at a minimum).

10 Click **OK**.



CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Procurement Cards > Definitions > Cardholder Profile

New Window | Help | Customize Page | http

Personal Data | Card Data

JONES, JOHN

☐ Display Unmasked Card Number

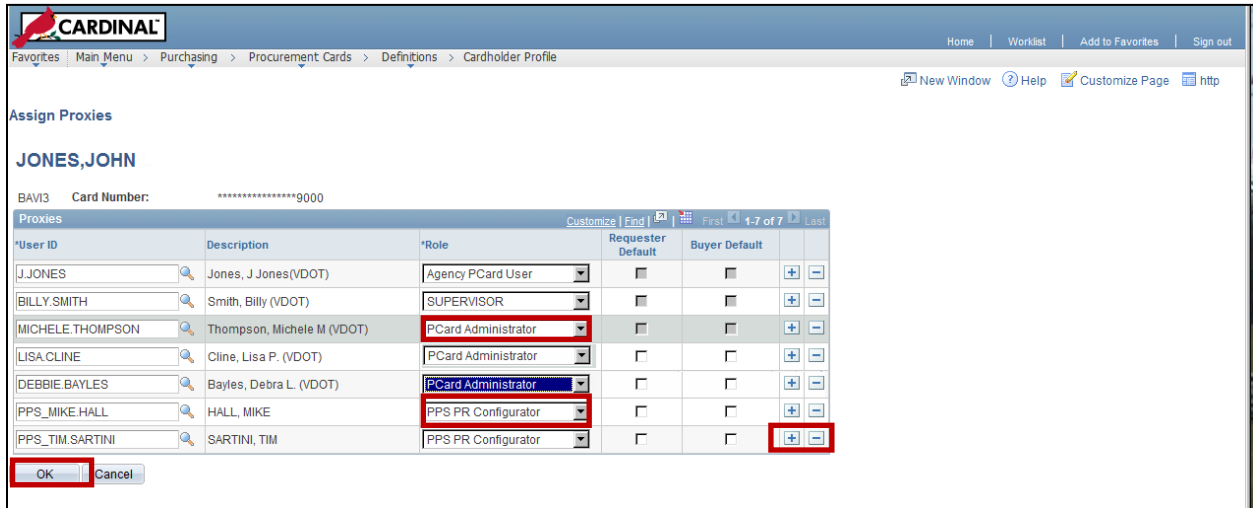
Card Data

*Business Unit	*Card Issuer	*Card Number	Vendor Card	Vendors	Proxies	Default Distrib	Commodity Codes
50100	BAV13	*****9000	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes

Save | Return to Search | Previous in List | Next in List | Notify

Personal Data | Card Data

11 Click **Proxies** hyperlink.



Assign Proxies

JONES, JOHN

BAV13 Card Number: *****9000

*User ID	Description	*Role	Requester Default	Buyer Default	
J.JONES	Jones, J Jones(VDOT)	Agency PCard User	<input type="checkbox"/>	<input type="checkbox"/>	+ -
BILLY.SMITH	Smith, Billy (VDOT)	SUPERVISOR	<input type="checkbox"/>	<input type="checkbox"/>	+ -
MICHELE.THOMPSON	Thompson, Michele M (VDOT)	PCard Administrator	<input type="checkbox"/>	<input type="checkbox"/>	+ -
LISA.CLINE	Cline, Lisa P. (VDOT)	PCard Administrator	<input type="checkbox"/>	<input type="checkbox"/>	+ -
DEBBIE.BAYLES	Bayles, Debra L. (VDOT)	PCard Administrator	<input type="checkbox"/>	<input type="checkbox"/>	+ -
PPS_MIKE.HALL	HALL, MIKE	PPS PR Configurator	<input type="checkbox"/>	<input type="checkbox"/>	+ -
PPS_TIM.SARTINI	SARTINI, TIM	PPS PR Configurator	<input type="checkbox"/>	<input type="checkbox"/>	+ -

OK Cancel

12 Click the “+” sign to add a new line or the “-” sign to delete a line.

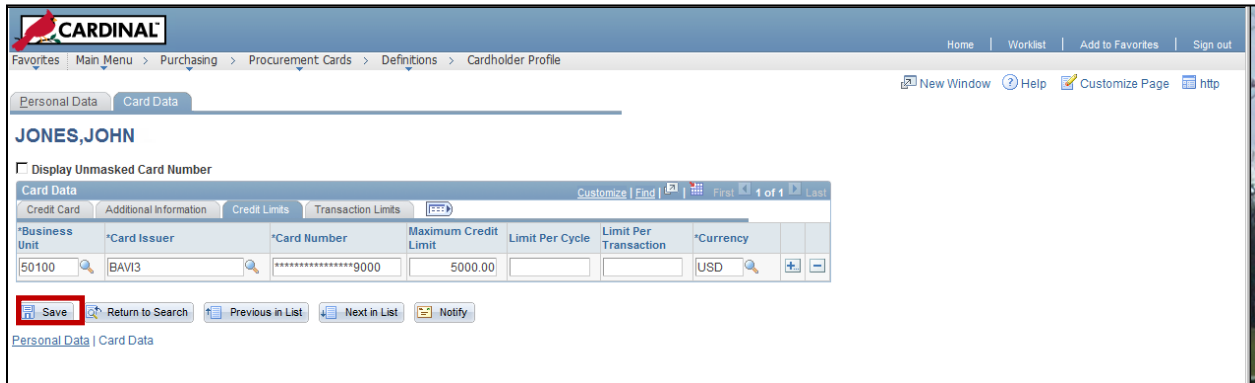
13 Look Up/Insert specified name and select the **Role**.

14 Enter Proxies as applicable.

Note: The PCard Proxy standard for each PCard is:

- The “**Agency PCard User**” is for all Reconcilers (there must be at least one).
- The “**Supervisor**” is for all Approvers (there must be at least one).
- The “**PCard Administrator**” designation is required for:
 - District Program Administrator
 - LISA.CLINE (ASD)
 - DEBBIE BAYLES (ASD)
- The “**PPS PR Configurator**” designation is required for the following:
 - PPS_TIM.SARTINI
 - PPS_MIKE.HALL

15 Click **OK**.



JONES, JOHN

☐ Display Unmasked Card Number

Card Data

*Business Unit	*Card Issuer	*Card Number	Maximum Credit Limit	Limit Per Cycle	Limit Per Transaction	*Currency
50100	BAV13	*****9000	5000.00			USD

Save [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

[Personal Data](#) | [Card Data](#)

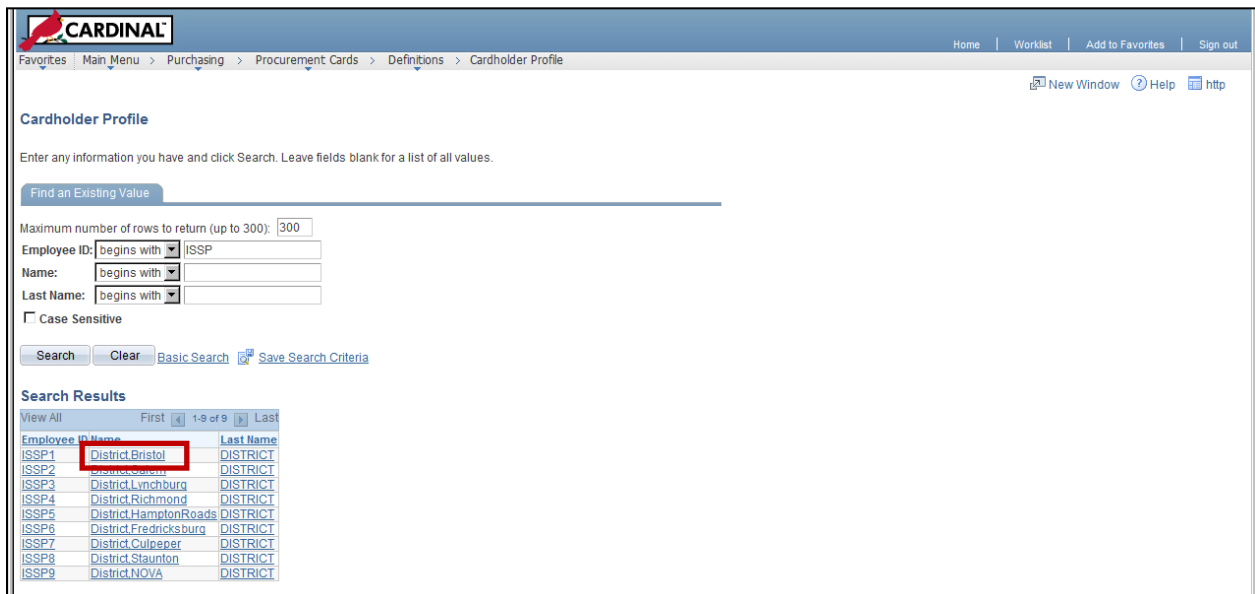
16 Click **Save**.

ISSP Set-UP

To Add or Delete ISSP Reconcilers and Approvers:

17 Navigate to **Purchasing > Procurement Cards > Definitions > Cardholder Profile**

18 Narrow your search for a particular district using the **Employee ID** field or any other search criteria



Cardholder Profile

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300): 300

Employee ID: begins with ISSP

Name: begins with

Last Name: begins with

☐ Case Sensitive

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

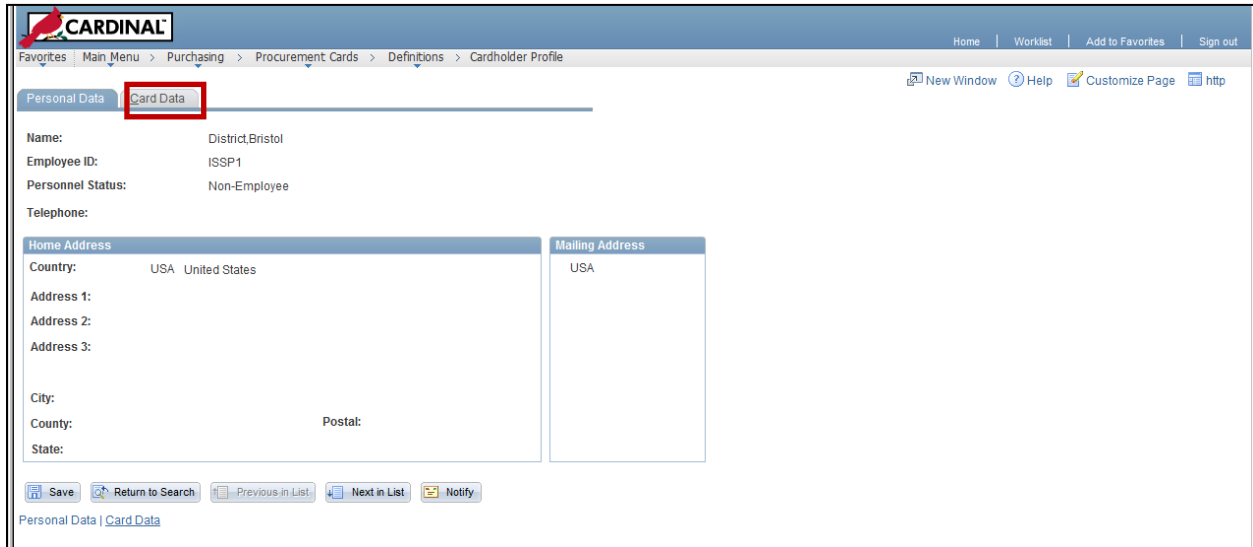
Search Results

View All First 1-9 of 9 Last

Employee ID	Name	Last Name
ISSP1	District Bristol	DISTRICT
ISSP2	District Lynchburg	DISTRICT
ISSP3	District Lynchburg	DISTRICT
ISSP4	District Richmond	DISTRICT
ISSP5	District Hampton Roads	DISTRICT
ISSP6	District Fredericksburg	DISTRICT
ISSP7	District Culpeper	DISTRICT
ISSP8	District Staunton	DISTRICT
ISSP9	District NOVA	DISTRICT

19 Select the specific ISSP District to make changes.

20 In this example, the first listed District is selected.



CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Procurement Cards > Definitions > Cardholder Profile

Personal Data | **Card Data**

Name: District, Bristol
Employee ID: ISSP1
Personnel Status: Non-Employee
Telephone:

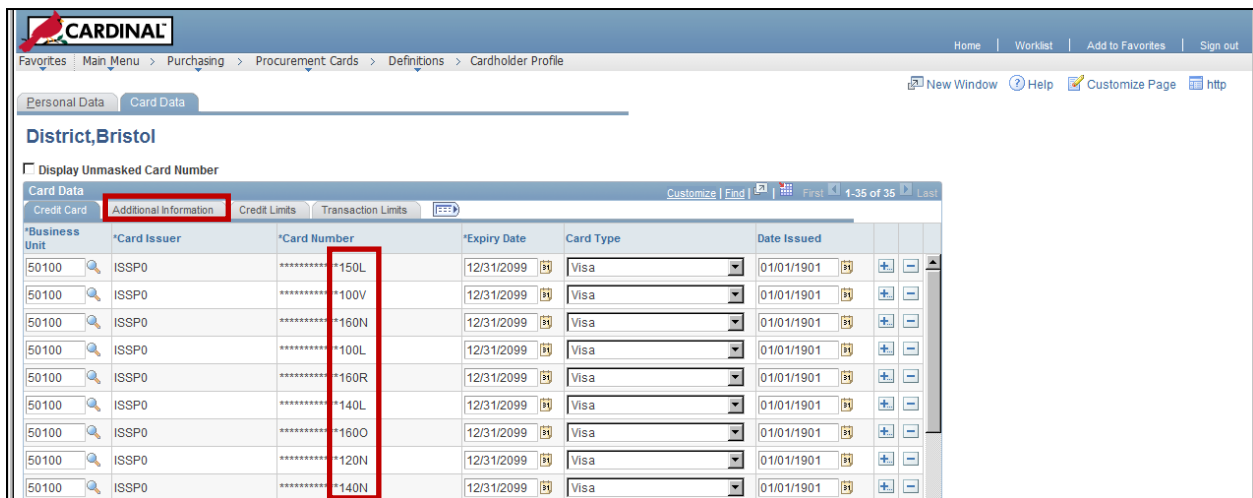
Home Address
Country: USA United States
Address 1:
Address 2:
Address 3:
City:
County: Postal:
State:

Mailing Address
USA

Save Return to Search Previous in List Next in List Notify

Personal Data | [Card Data](#)

21 Click on the **Card Data** tab.



CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Procurement Cards > Definitions > Cardholder Profile

Personal Data | **Card Data**

District, Bristol

☐ Display Unmasked Card Number

Card Data

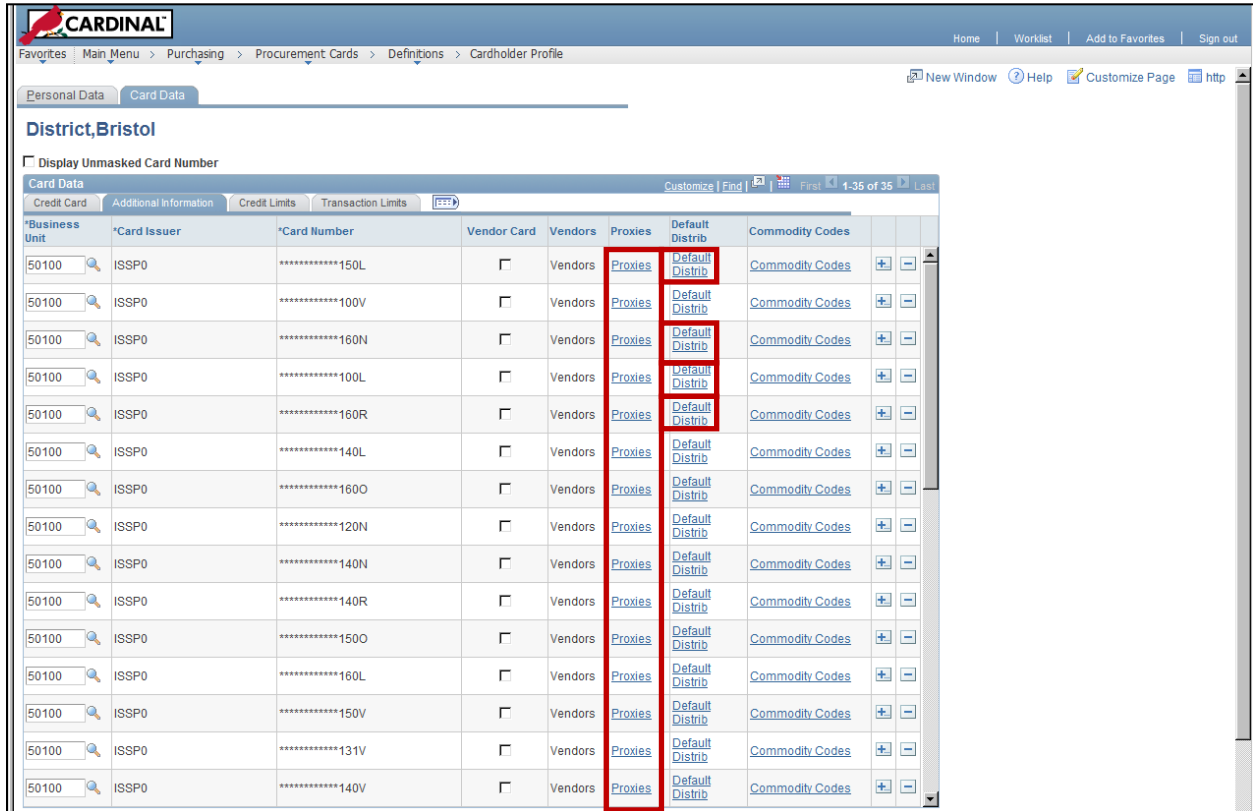
Customize | Find | First 1-35 of 35 Last

*Business Unit	*Card Issuer	*Card Number	*Expiry Date	Card Type	Date Issued
50100	ISSP0	*****150L	12/31/2099	Visa	01/01/1901
50100	ISSP0	*****100V	12/31/2099	Visa	01/01/1901
50100	ISSP0	*****160N	12/31/2099	Visa	01/01/1901
50100	ISSP0	*****100L	12/31/2099	Visa	01/01/1901
50100	ISSP0	*****160R	12/31/2099	Visa	01/01/1901
50100	ISSP0	*****140L	12/31/2099	Visa	01/01/1901
50100	ISSP0	*****160O	12/31/2099	Visa	01/01/1901
50100	ISSP0	*****120N	12/31/2099	Visa	01/01/1901
50100	ISSP0	*****140N	12/31/2099	Visa	01/01/1901

Note: There are 5 different types of ISSP accounts. They are:

- L= Other Agency
- V= Non-Equipment
- R= Rental
- N= Non-Rental
- O= Non-Equipment

22 Click on the **Additional Information** tab



District, Bristol

☐ Display Unmasked Card Number

Card Data

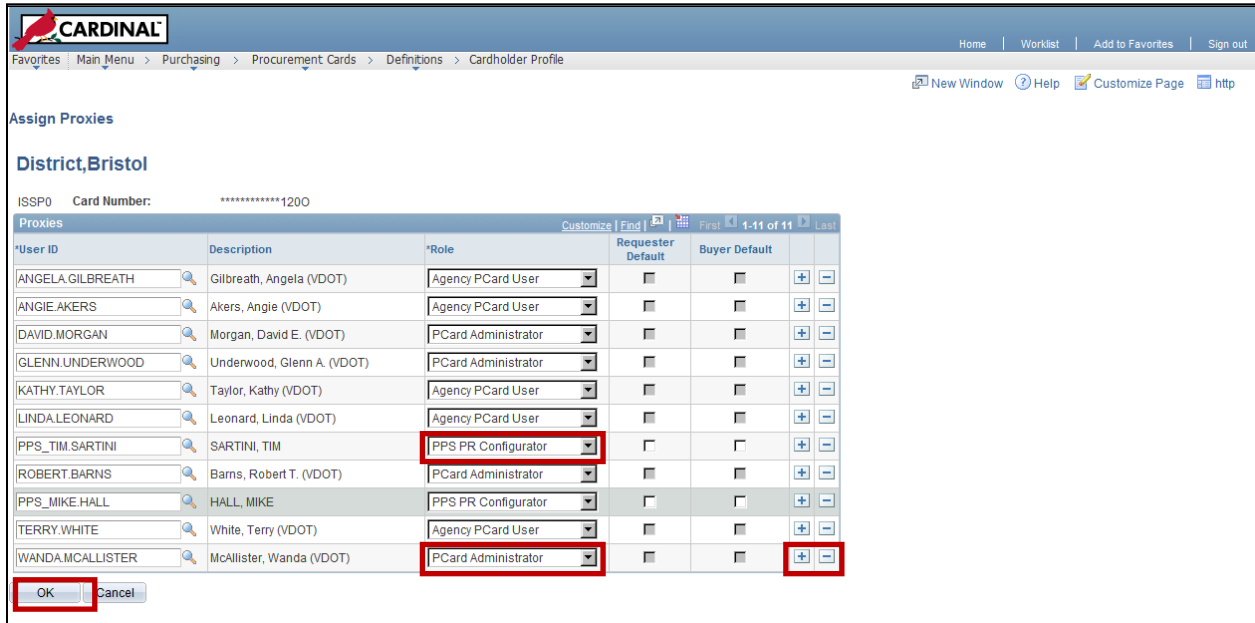
Customize | Find | First | 1-35 of 35 | Last

*Business Unit	*Card Issuer	*Card Number	Vendor Card	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****150L	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****100V	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****160N	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****100L	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****160R	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****140L	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****160O	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****120N	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****140N	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****140R	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****150O	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****160L	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****150V	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****131V	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes
50100	ISSP0	*****140V	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes

23 Click on the **Default Distrib** hyperlink to enter a chart of accounts for each account ending in **L**, **N**, **R**, and **O**. There is no need to enter a default chart of accounts for **V**.

24 Click on the **Proxies** hyperlink for each account.

Note: The following will need to be done for **EACH** of the cards that you would like to update.



Assign Proxies

District, Bristol

ISSP0 Card Number: *****1200

User ID	Description	Role	Requester Default	Buyer Default
ANGELA.GILBREATH	Gilbreath, Angela (VDOT)	Agency PCard User	<input type="checkbox"/>	<input type="checkbox"/>
ANGIE.AKERS	Akers, Angie (VDOT)	Agency PCard User	<input type="checkbox"/>	<input type="checkbox"/>
DAVID.MORGAN	Morgan, David E. (VDOT)	PCard Administrator	<input type="checkbox"/>	<input type="checkbox"/>
GLENN.UNDERWOOD	Underwood, Glenn A. (VDOT)	PCard Administrator	<input type="checkbox"/>	<input type="checkbox"/>
KATHY.TAYLOR	Taylor, Kathy (VDOT)	Agency PCard User	<input type="checkbox"/>	<input type="checkbox"/>
LINDA.LEONARD	Leonard, Linda (VDOT)	Agency PCard User	<input type="checkbox"/>	<input type="checkbox"/>
PPS_TIM.SARTINI	SARTINI, TIM	PPS PR Configurator	<input type="checkbox"/>	<input type="checkbox"/>
ROBERT.BARNS	Barns, Robert T. (VDOT)	PCard Administrator	<input type="checkbox"/>	<input type="checkbox"/>
PPS_MIKE.HALL	HALL, MIKE	PPS PR Configurator	<input type="checkbox"/>	<input type="checkbox"/>
TERRY.WHITE	White, Terry (VDOT)	Agency PCard User	<input type="checkbox"/>	<input type="checkbox"/>
WANDA.MCALLISTER	McAllister, Wanda (VDOT)	PCard Administrator	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

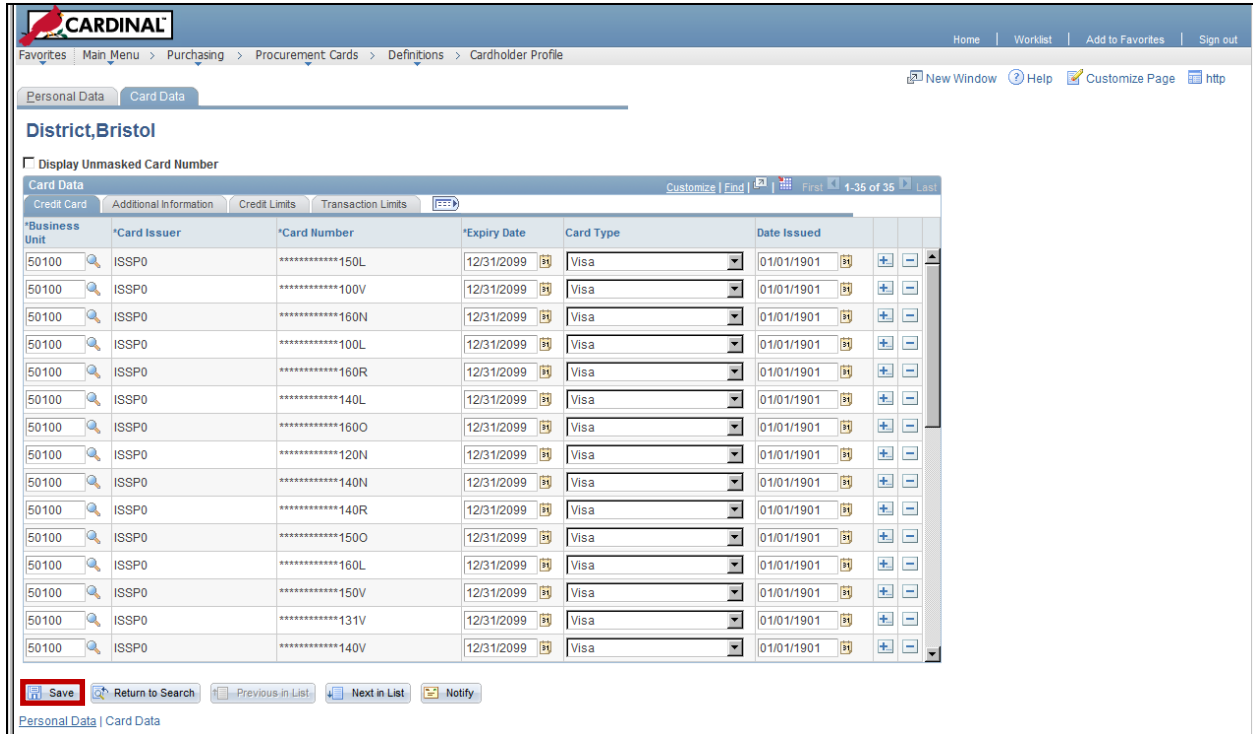
25 Click the “+” sign to add a new line or the “-” sign to delete a line.

26 Look Up/Insert specified name and select the **Role**.

27 Click **OK**.

Note: The ISSP Proxy standard for each location (card) is:

- The “**PCard Administrator**” designation is required for the following:
 - DAVID.MORGAN
 - GLENN.UNDERWOOD
 - ROBERT.BARNS
 - WANDA.MCALLISTER
- The “**PPS PR Configurator**” designation is required for the following:
 - PPS_TIM.SARTINI.
 - PPS_MIKE.HALL
- The “**Agency PCard User**” is for all Reconcilers (there must be at least one).
- The “**Supervisor**” is for all Approvers (there must be at least one).



District, Bristol

☐ Display Unmasked Card Number

Card Data Customize | Find | First 1-35 of 35 Last

*Business Unit	*Card Issuer	*Card Number	*Expiry Date	Card Type	Date Issued		
50100	ISSP0	*****150L	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****100V	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****160N	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****100L	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****160R	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****140L	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****160O	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****120N	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****140N	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****140R	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****150O	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****160L	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****150V	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****131V	12/31/2099	Visa	01/01/1901	+	-
50100	ISSP0	*****140V	12/31/2099	Visa	01/01/1901	+	-

Save **Return to Search** **Previous in List** **Next in List** **Notify**

[Personal Data](#) | [Card Data](#)

28 Click **Save**.